

What is claimed is:

1. A method of managing referrals from a referrer to a referee, the
5 method comprising:

in response to a first set of signals received from a referrer
computer, causing a database to store information pertaining to
a referral from said referrer to said referee, as a collection of
10 linked information units, said information units including a
referrer identifier identifying said referrer as originator of said
information and a referee identifier identifying said referee as
intended recipient of said information, said collection
representing said referral and being accessible by said referrer
15 computer and by a referee computer;

in response to a second set of signals received from one of said
referrer and referee computers, causing collections of
information units that satisfy a criterion, to be identified and
20 causing identifications of said collections to be displayed, at said
one of said referrer and referee computers,

in response to a third set of signals received from said one of
said referrer and referee computers, causing at least one
25 information unit in a collection corresponding to a displayed
identification, to be displayed at said one of said referrer and
referee computers; and

in response to a fourth set of signals received from said one of
said referrer and referee computers, causing at least one
30 information unit in said collection corresponding to a displayed
identification, to be modified.

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2. The method of claim 1 wherein causing information to be stored comprises causing a referral status flag, representing a status of said referral to be stored, in an information unit of said collection, and causing said referral status flag to be set to a first value to indicate that the collection has not yet been viewed by the referee.
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3. The method of claim 2 further comprising causing said referral status flag to be set to a second value if at least one information unit of said collection has been displayed at said referee computer.
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4. The method of claim 2 wherein identifying collections comprises identifying collections having a referral status flag satisfying a referral status criterion.
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5. The method of claim 1 further comprising (a) facilitating uploading of a file from one of said referrer and referee computers in response to upload signals received therefrom; (b) causing said file to be stored in association with a collection associated with both said referrer and said referee; and (c) facilitating downloading of said file to one of said referrer and referee computers in response to download signals received therefrom.
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6. The method of claim 1 wherein identifying collections comprises establishing said criterion based on at least one of said referrer identifier and said referee identifier.
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7. The method of claim 6 wherein establishing said criterion comprises causing said criterion to be set to a predefined criterion selected from a set of predefined criteria, in response to a selection signal, in said second set of signals, selecting said predefined criterion, each
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predefined criterion in said set being based on one of said referrer identifier and said referee identifier.

- 5 **8.** The method of claim 1 wherein identifying collections comprises identifying collections including at least one of said referrer identifier and said referee identifier.
- 10 **9.** The method of claim 1 wherein causing at least one information unit to be modified comprises causing a modification flag to be set in an information unit associated with said collection corresponding to a displayed identification.
- 15 **10.** The method of claim 9 wherein causing said modification flag to be set comprises causing a modification flag value to be stored as said modification flag to represent a modification command received in said fourth set of signals.
- 20 **11.** The method of claim 9 further comprising, if said collection corresponding to a displayed identification is caused to be displayed at one of said referrer and referee computers, causing said modification flag to be reset.
- 25 **12.** The method of claim 9 wherein identifying collections comprises identifying collections having a modification flag satisfying a modification criterion so that identifications corresponding to collections having information units that have been modified in accordance with said modification criterion, are displayed.
- 30 **13.** The method of claim 9 further comprising causing to be presented , a representation of said modification flag, at at least one of said referrer and said referee computers.

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14. The method of claim 1 wherein causing identifications to be displayed comprises listing labels respectively associated with said collections to be shown in a display image.
- 5 15. The method of claim 14 wherein causing identifications to be displayed comprises using different display parameters for different labels to distinguish at least one label from another.
- 10 16. The method of claim 15 further comprising causing a set of display parameters associated with a selection criterion to be associated with labels of collections that satisfy said selection criterion.
- 15 17. The method of claim 1 wherein causing information to be stored comprises causing information including at least one of a client name or identifier, a client date of birth, a need, an urgency status associated with said need, a referrer name, and a referee name to be stored.
- 20 18. The method of claim 1 wherein causing information to be stored causing a class identifier classifying said referral into a pre-defined classification to be produced, in response to said first set of signals, and causing said class identifier to be stored in an information unit associated with said collection.
- 25 19. The method of claim 18 further comprising causing at least one question to be presented to an operator of said referrer computer, receiving a response to said at least one question, and causing said class identifier to be produced in response to said response to said at least one question.
- 30 20. The method of claim 18 wherein causing collections to be identified includes causing collections that have class identifiers satisfying a criterion to be identified.

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21. The method of claim 1 further comprising causing at least one question to be presented to an operator of said referrer computer and receiving a response to said at least one question.
22. The method of claim 21 further comprising causing said response to said at least one question to be stored in information units associated with said collection.
- 10 23. The method of claim 21 further comprising causing a notification to be transmitted to said referrer computer when said response to said at least one question does not satisfy a validation criterion.
- 15 24. The method of claim 1 wherein causing identifications to be displayed comprises causing identifications to be displayed in an order dependent upon at least one information unit in each collection.
- 20 25. The method of claim 1 further comprising causing an event log to be associated with said collection and adding an entry to be added to said event log in response to occurrence of an event involving modification of at least one information unit of said collection in response to said fourth set of signals.
- 25 26. The method of claim 25 wherein causing an entry to be added said event log comprises causing a chronological order indicator to be associated with an identification of said event.
- 30 27. The method of claim 26 wherein said identification of said event includes an identification of said referrer or referee computer from which said fourth set of signals were received.

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28. The method of claim **25** further comprising facilitating viewing of said event log from at least one of said referrer and said referee computers.

29. The method of claim **1** further comprising, in response to receiving said fourth set of signals from said one of said referrer and referee computers, causing a message to be sent to the other of said one of said referrer and said referee computers.

30. The method of claim **1** further comprising causing information units and computer readable codes to be transmitted from said database, to one of said referrer and referee computers, said computer-readable codes being operable to cause a processor circuit at said one of said referrer and referee computers,

(i) to cause at least some of the transmitted information to be displayed at said one of said referrer and referee computers; and

(ii) to facilitate generation, in response to user input at said one of said referrer and referee computers, of communication signals for transmission from said one of said referrer and referee computers, said communication signals including at least one of said first, second, third and fourth sets of signals.

31. The method of claim **30** wherein said computer-readable codes are interpretable by a markup language interpreter.

32. The method of claim **1** wherein said third set of signals includes a selection signal indicating selection of said collection corresponding to a displayed indication.

33. The method of claim **1** wherein said third and fourth sets of signals are the same.

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5 **34.** The method of claim 1 wherein causing at least one information unit in said collection corresponding to a displayed indication to be modified comprises limiting which information units may be modified according to whether said fourth set of signals are received from said referrer computer or said referee computer.

10 **35.** The method of claim 1 further comprising causing a computer to be identified as being associated with said referrer or said referee, in response to a respective referrer or referee key associated with said referrer or referee respectively, received from said computer.

15 **36.** The method of claim 1 further comprising linking said identifications with a display interface operable to cause information units in a corresponding collection to be displayed.

37. A signal encoded with computer-readable codes for directing a processor circuit to perform the method recited in claim 1.

20 **38.** A computer-readable medium comprising codes for directing a processor circuit to perform the method recited in claim 1.

25 **39.** A computer-generated user interface soliciting responses from a user that are provided to a computer having a memory with computer-executable codes operable to cause said computer to perform the method of claim 1, in response to said responses.

40. An apparatus to facilitate management of referrals from a referrer to a referee, the apparatus comprising:

30 storing means, responsive to a first set of signals received from a referrer computer, for storing, in a database, information pertaining to a referral from said referrer to said referee, said

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information being stored as a collection of linked information units, said information units including a referrer identifier identifying said referrer as originator of said information and a referee identifier identifying said referee as intended recipient of said information, said collection representing said referral and being accessible by said referrer computer and a referee computer;

collection identification means, responsive to a second set of signals received from one of said referrer and referee computers, for identifying, in said database, collections of information units that satisfy a criterion, and for causing identifications to be displayed at said one of said referrer and referee computers, said identifications corresponding to respective collections of information units satisfying said criterion;

information display means, responsive to a third set of signals received from said one of said referrer and referee computers, for causing at least one information unit in a collection corresponding to a displayed identification, to be displayed at said one of said referrer and referee computers; and

information modification means, responsive to a fourth set of signals received from said one of said referrer and referee computers, for causing at least one information unit in said collection corresponding to a displayed identification, to be modified.

41. An apparatus to facilitate management of referrals from a referrer to a referee, the apparatus comprising:

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5 a database interface operable to control a database, said database interface being operable to cause the database to store information from a referrer computer, said information pertaining to a referral from said referrer to said referee, said information being stored as a collection of linked information units, said information units including a referrer identifier identifying said referrer computer as originator of said information and a referee identifier identifying a referee computer as intended recipient of said information, said
10 collection representing said referral;

15 a filter operable to cause said database interface to identify, in said database, collections of information units that satisfy a criterion, and to cause identifications to be displayed at one of said referrer and referee computers, said identifications corresponding to respective collections of information units satisfying said criterion; and

20 a client interface cooperating with said database interface and filter and operable to communicate with and be controlled from said referrer and referee computers, said client interface comprising:

25 a referral creation facility operable to facilitate causing said database interface to store said information as said collection in response to signals received from said referrer computer;

30 an information display facility operable to facilitating viewing, from said one of said referrer and referee computers, of at least one information unit in a collection identified by said filter; and

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an information modification facility operable to facilitate causing a modification, from said one of said referrer and referee computers, of at least one information unit in a collection identified by said filter;

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wherein said filter is operable to identify said collection when said collection satisfies said criterion and to cause an identification corresponding to said collection to be displayed at said one of said referrer and referee computers.

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42. The apparatus of claim **41** wherein said database interface, said filter and said client interface are implemented by a processor circuit.

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43. The apparatus of claim **42** wherein said processor circuit includes a processor and memory in communication with said processor, said memory being encoded with codes for directing said processor to effect said database interface, said filter and said client interface.

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44. The apparatus of claim **43** wherein said codes include codes for directing said processor to cause a referral status flag to be stored in an information unit of said collection and to set said referral status flag to a set to a first value to indicate that the collection has not yet been viewed by the referee.

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45. The apparatus of claim **44** wherein said codes include codes for directing said processor to cause said referral status flag to be set to a second value if at least one information unit of said collection has been displayed at said referee computer.

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46. The apparatus of claim **43** wherein said codes include codes for directing said processor to cause, in said database, to identify said collections of information units that satisfy said criterion.

47. The apparatus of claim 46 wherein said codes include codes for directing said processor to cause said database to identify collections having a referral status flag satisfying a referral status criterion.

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48. The apparatus of claim 46 wherein said codes comprise codes for directing said processor to cause said database to identify collections including at least one of said referrer identifier and said referee identifier.

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49. The apparatus of claim 41 wherein said client interface is further operable to cooperate with said database interface to:

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(a) facilitate uploading a file, into said database, from one of said referrer and referee computers in response to upload signals received therefrom; and

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(b) facilitate downloading said file, from said database, to one of said referrer and referee computers in response to download signals received therefrom.

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50. The apparatus of claim 43 wherein said codes include codes for directing said processor to cause said database to store a modification flag in an information unit of said collection and to cause said database to set said modification flag to a first value to indicate that the collection has not yet been modified.

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51. The apparatus of claim 50, wherein said codes include:

codes for directing said processor to cause said database to cause said modification flag to be set to a second value when said information modification facility is controlled, from said one

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of said referrer and referee computers, to cause a modification to said collection identified by said filter; and

codes for directing said processor to cause the database to cause modification flag to be set a third value when said information display facility is controlled, from the other of said referrer and referee computers, to cause display of said collection identified by said filter.

52. The apparatus of claim 50 wherein said codes include codes for directing said processor to cause the database to store a value in said modification flag, said value representing a modification command received by said information modification facility from said one of said referrer and referee computers.

53. The apparatus of claim 52 wherein said codes comprise codes for directing said processor to cause the database to identify collections having a modification flag satisfying a modification criterion so that identifications corresponding to collections having information units that have been modified in accordance with said modification criterion, are displayed.

54. The apparatus of claim 52 wherein said codes include codes for directing said processor to cause a representation of said modification flag to be presented at at least one of said referrer and said referee computers.

55. The apparatus of claim 41 wherein said information display facility cooperates with said filter to cause labels respectively associated with said collections satisfying said criterion to be displayed at said one of said referrer and referee computers using a first set of display parameters.

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56. The apparatus of claim 55 wherein said information display facility cooperates with said filter to cause labels associated with collections satisfying an additional selection criterion to be displayed at said one of said referrer and referee computers using a second set of display parameters in order to distinguish labels associated with collections which satisfy said additional selection criterion from labels associated with collections that do not.

57. The apparatus of claim 41 wherein said collection includes at least one of a client name or identifier, a client date of birth, a need, an urgency status associated with said need, a referrer name, and a referee name.

58. The apparatus of claim 41 wherein said referral creation facility is operable to produce a class identifier classifying said referral into a pre-defined classification in response to receiving said information, said referral creation facility being operable to cause said database interface to store said class identifier in information units associated with said collection.

59. The apparatus of claim 41 wherein said client interface is operable to cause at least one question to be presented to an operator of said referrer computer, to receive a response to said at least one question, and to cause said database interface to store said response.

60. The apparatus of claim 55 wherein said client interface is operable to cause a notification to be transmitted to said referrer computer when said response to said at least one question does not satisfy a validation criterion.

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61. The apparatus of claim 41 wherein said filter causes identifications to be displayed in an order dependent upon at least one information unit in each collection corresponding to a displayed identification.

5 62. The apparatus of claim 41 wherein said database interface is operable to cause the database to maintain an event log for each collection and wherein said client interface is operable to cause said database interface to update said event log to cause an entry to be added to said event log in response to occurrence of an event involving said information modification facility being controlled from one of said
10 referrer and referee computers to cause a modification to at least one information unit of said collection, wherein said entry includes at least one of a chronological order indicator, an identification of said event, and an identification of said one of said referrer and referee computers from which said modification was caused.

15 63. The apparatus of claim 62 wherein said information display facility is operable to be controlled from said one of said referrer and referee computers to cause display of said event log thereat.

20 64. The apparatus of claim 52 wherein said information modification facility responds to receiving said modification command from one of said referrer and referee computers by facilitating sending a message therefrom to the other of said referrer and referee computers.

25 65. The apparatus of claim 41 wherein said client interface is operable to cause information units from said database and computer-readable codes, to be transmitted to one of said referrer and referee computers, said computer-readable codes being operable to cause a processor
30 circuit at said one of said referrer and referee computers,

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(i) to cause at least some of said transmitted information to be displayed at said one of said referrer and referee computers; and

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(ii) to facilitate generation, in response to user input at said one of said referrer and referee computers, of communication signals for transmission from said one of said referrer and referee computers to said client interface.

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66. The apparatus of claim **41** wherein said client interface is operable to receive, from said one of said referrer and referee computers, a selection signal indicating selection of said collection identified by said filter, and to cause said information display facility to cause an information unit of said collection identified by said filter to be displayed at said one of said referrer and referee computers in response thereto.

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67. The apparatus of claim **41** wherein said client interface further comprises an authentication facility operable to identify a computer from which signals are received as being associated with a user, in response to receiving from said computer a user key associated with a user identifier identifying said user.

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68. The apparatus of claim **67** wherein said client interface is further operable to establish said criterion based on said user identifier.

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69. The apparatus of claim **41** wherein said client interface is further operable to cause said filter to use, as said criterion, a predefined criterion selected from a set of predefined criteria, in response to a selection signal received from said computer, indicating said predefined criterion.

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- 70.** A data structure facilitating the communication of information pertaining to a referral from a referrer to a referee, the structure comprising:

5 a collection of linked information units pertaining to the referral, at least some of said information units of said collection being operable to be modified, said information units of said collection including:

10 a referrer identifier identifying a referrer computer as being originator of said collection, said referrer computer being associated with said referrer;

15 a referee identifier identifying a referee computer as an intended recipient of said collection, said referee computer being associated with said referee; and

20 a modification flag operable to indicate that a modification was made, from one of said referrer and referee computers, to at least one information unit of said collection.

- 71.** A computer-readable medium encoded with the data structure of claim **70**.

- 25 **72.** The data structure of claim **70** wherein said information units of said collection further include an event log operable to store an entry indicating occurrence of an event.

- 30 **73.** The data structure of claim **70** wherein said information units of said collection further include a referral status field operable to indicate a referral status comprising at least one of:

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an unread status signifying that said collection has not been viewed from said referee computer;

5 an appointment set status signifying that an appointment has been set for the referral represented by said collection;

a cancelled status signifying that the referral represented by said collection has been cancelled; and

10 a completed status signifying that the referral represented by said collection has been completed by said referee.

15 74. The data structure of claim 70 wherein said information units of said collection further include at least one of a client name or identifier, a client date of birth, a need in respect of which the referral is made, an urgency status associated with said need, a referrer name, and a referee name.

20 75. The data structure of claim 70 wherein said information units of said collection further include at least one of:

a wait list priority field indicating a priority of the referral represented by said collection in a waitlist of said referee;

25 a wait list status field indicating a status of the referral in said waitlist; and

a waitlist reason field indicating a reason for placing the referral on said waitlist.

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76. The data structure of claim 70 wherein said information units of said collection further include at least one of a referral date sent field, a

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referral type field, a referral identifier field, a notes field, a client contacted field indicating whether said client was contacted about the referral, a certainty flag for indicating a level of certainty regarding a diagnosis, a referral status field, an appointment time field, a referral reason field, an appointment cancellation reason field, a carbon copy field, a payer field, an attached files status field, and an archived status field.